

State of Kansas

FOCUS Project Upgrade Meeting

March 25, 2015

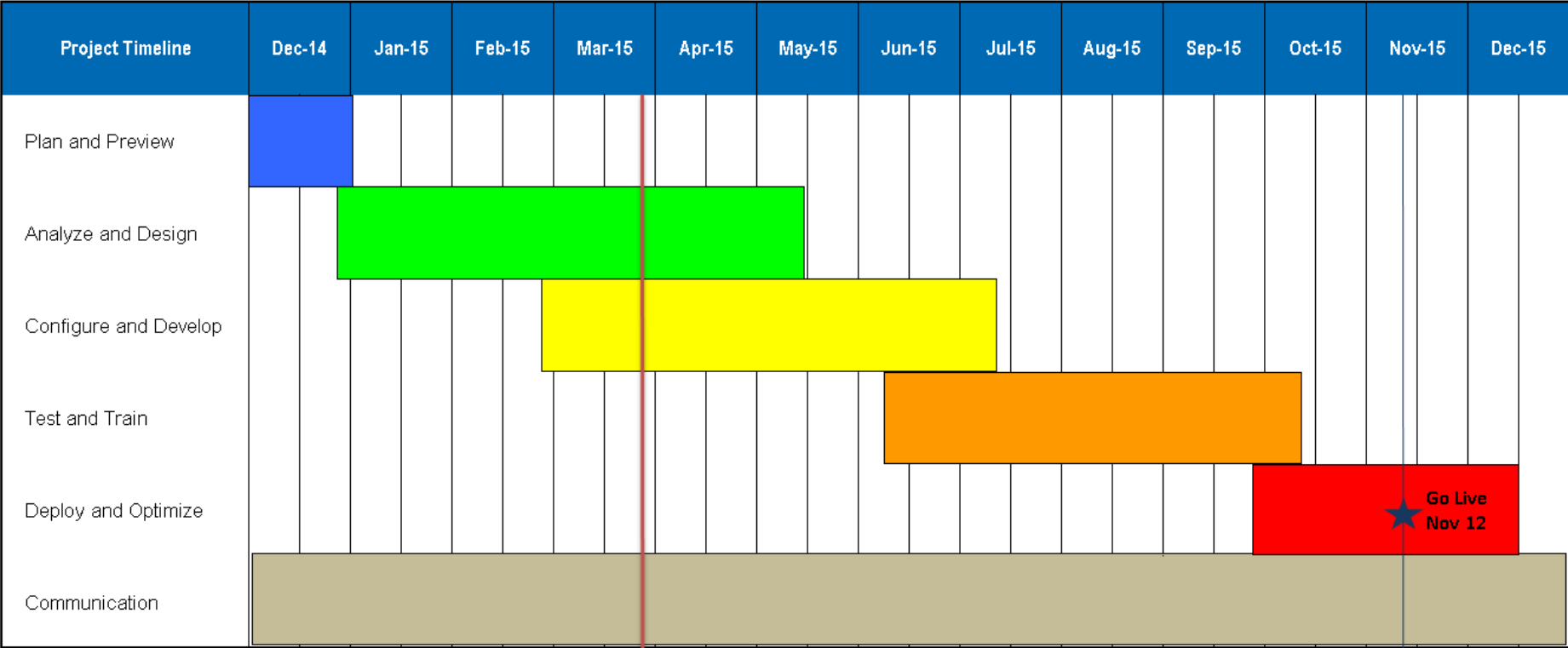
- Introductions
- Executive Message
- Project Timeline
- Upgrade vs Implementation Methodology
- Fit Gap Summary
- New Functionality
- Security & Browser Compatibility
- Agency Tasks
- Change Management
- What's Next
- Closing Remarks/Questions

Executive Message

- Jim Clark, Secretary
Department of Administration

Project Timeline

Where we are today



Phase II – Analyze & Design

- During the Analyze & Design phase the FOCUS team has completed:
 - Fit/Gap sessions
 - Technical preparation of the infrastructure and new PeopleSoft release
 - Initial upgrade pass
 - System design documents
- The FOCUS Team is currently working on
 - Functional and Technical specifications for the retrofit of existing customizations (Online Pages, Interfaces, Reports and Workflow)
 - Functional and Technical specifications for configuring / customizing new functionality provided by the 9.2 release of the software

Phase III – Configure & Develop

- During the Configure & Develop phase, the FOCUS Project Team will:
 - Reviewing and configure setup tables
 - Change existing security and implement new security settings
 - Documenting new or updated business processes and learning guides
 - Creating or updating technical specifications
 - Creating test plan and updating or creating new test scripts
 - Retrofit of approved customizations, developing or updating interfaces, batch processes, and reports
 - Creating user training materials and post those training materials to SmartWeb
- First Test Move to Production
 - Update upgrade scripts and unit test system components
 - Apply patches and fixes
 - Unit testing and data validation

Upgrade vs Implementation

Upgrade vs Implementation

- Limited Scope
 - Upgrade SMART from PeopleSoft FSCM 9.0 to 9.2
 - Evaluate new functionality provided by 9.2
 - Evaluate if new functionality can replace existing Mods
 - Minimal budget available for new customizations or configuration
- Limited Timeframe
 - 11 months Kick-off to “Go Live”
 - Technical Upgrade done by Upgrade Lab
 - Three (3) PeopleSoft Financial environments (Demo, Dev, Tst)
 - Initial Upgrade Pass plus Three (3) test moves
- Limited Project Team
 - Smaller On-site consulting team
 - Smaller State of Kansas project team – must leverage other teams for SME
 - Offshore development to retrofit existing customizations or build new custom objects

Fit Gap Summary

- During the month of January the FOCUS project conducted 19 Fit Gap sessions for the following modules.

| | | |
|-----------------------|--------------------|---------------------|
| ePro/ Purchasing | Strategic Sourcing | Accounts Receivable |
| Expenses | Accounts Payable | Supplier Contracts |
| Project Costing | Grants | Cash Management |
| Contracts and Billing | Asset Management | |
| General Ledger | Commitment Control | |

- Each fit Gap discussed
 - Existing Business Processes
 - New Functionality available in version 9.2
 - Pain Points with current version of SMART
 - Interfaces, Reports and Workflows
- The updated Fit / Gap presentations and notes have been posted onto SMARTWeb

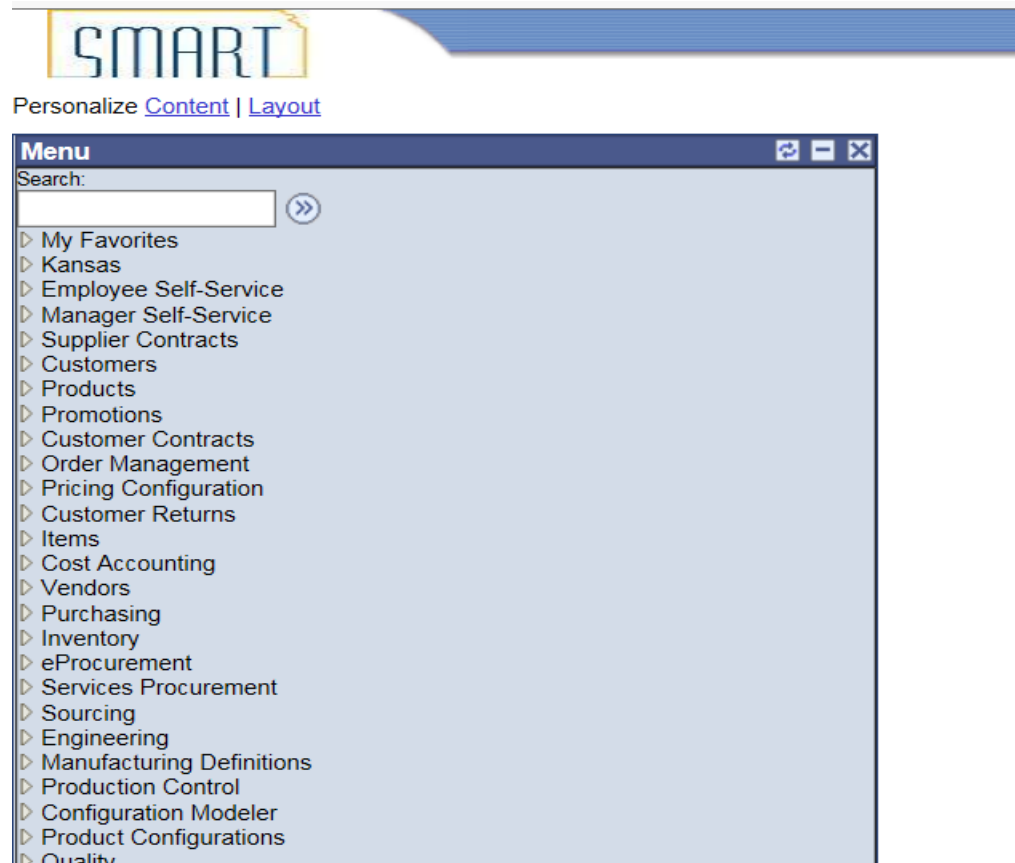
New Functionality

New Functionality

- Global Enhancements
- Work Centers
- eSupplier
- Mobile Applications

Global Enhancements

- Look & Feel has been updated
 - Menu and navigation will be a change for users



Menu in SMART 9.0:

Menu in version 9.2:

The screenshot displays the Oracle Focus 9.2 web application interface. At the top, there is a navigation bar with a 'Favorites' dropdown and a 'Main Menu' dropdown. The 'Main Menu' dropdown is currently open, showing a list of menu items. Below the navigation bar, the Oracle logo is visible on the left, and a search bar with 'General Ledger' selected is in the center. To the right of the search bar are links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. On the far right of the page, there are links for 'Personalize Content | Layout' and a 'Help' link with a question mark icon.

Top Menu Features Description

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

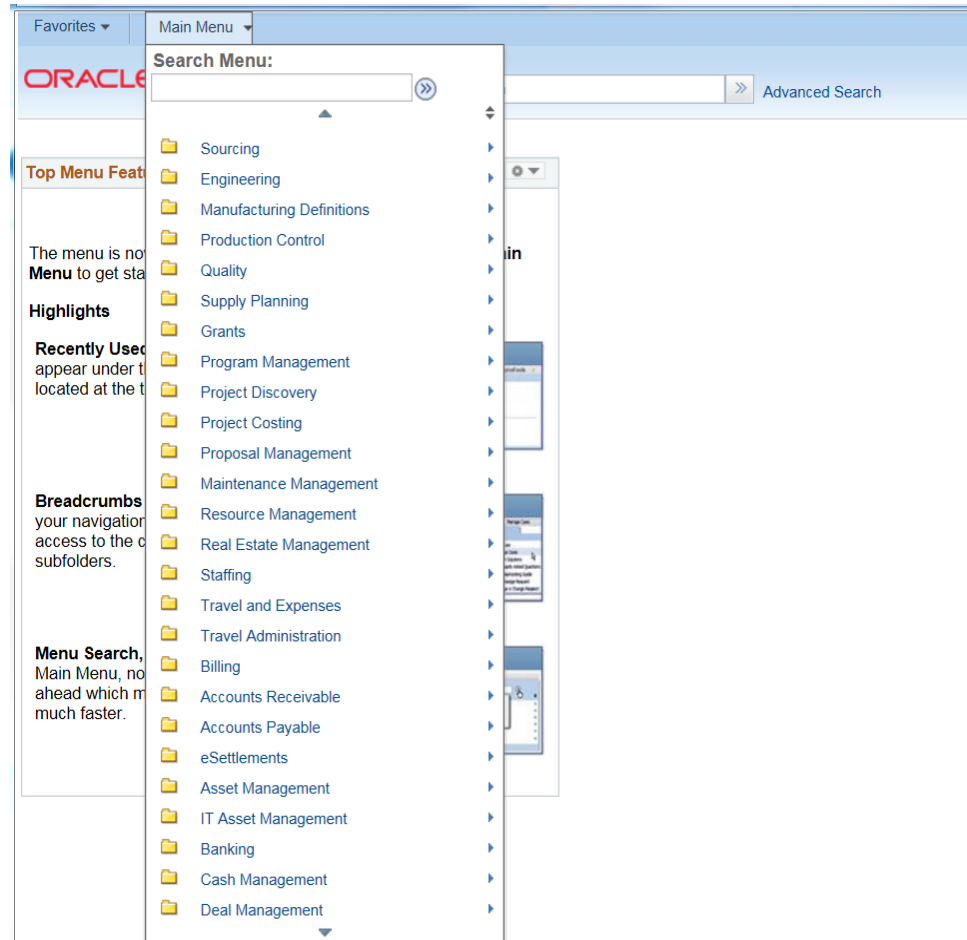
Highlights

Recently Used pages now appear under the Favorites menu, located at the top left.

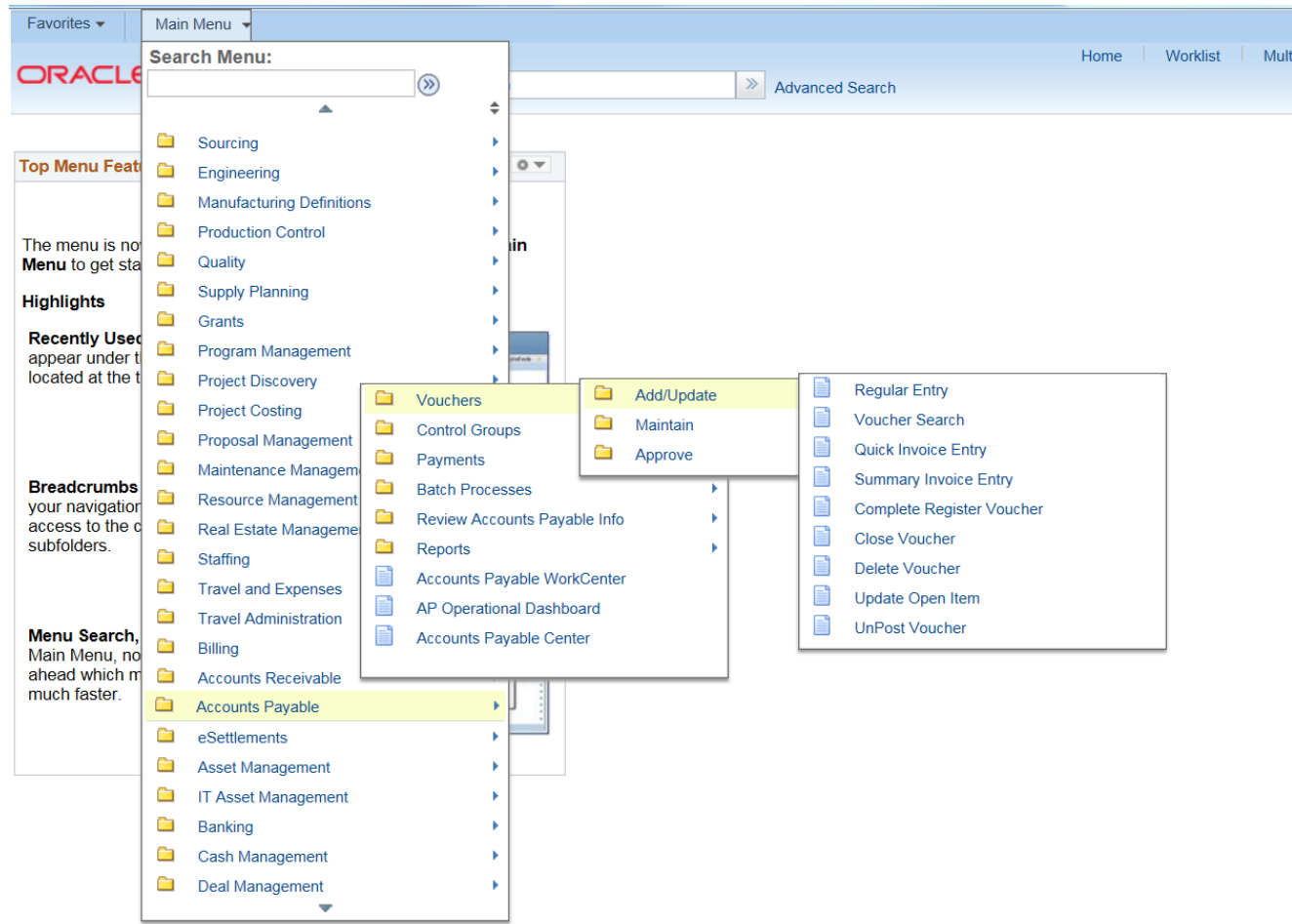
Breadcrumbs visually display your navigation path and give you access to the contents of subfolders.

Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.

Start by clicking on Main Menu



Breadcrumbs visually display the navigation path to a page



Global Enhancements

Page layouts look very similar in each version

Voucher Summary tab in SMART 9.0:

The screenshot shows the SMART 9.0 Voucher Summary tab. It features a left-hand menu with various navigation options. The main content area displays a form with the following fields:

| Summary | | Related Documents | | Invoice Information | | Payments | | Voucher Attributes | | Error Summary | |
|----------------------------|------------------------|------------------------|------------|---------------------|--|----------|--|--------------------|--|---------------|--|
| Business Unit: | 17300 | Invoice Date: | 02/26/2015 | | | | | | | | |
| Voucher ID: | | Invoice No: | 09209 | | | | | | | | |
| Voucher Style: | Regular | Invoice Total: | 7.09 | USD | | | | | | | |
| Contract ID: | | Pay Terms: | Due Now | | | | | | | | |
| Vendor Name: | ATLANTA, GA 30353-0954 | Voucher Source: | Online | | | | | | | | |
| Entry Status: | Postable | Origin: | ON2 | | | | | | | | |
| Match Status: | No Match | Created: | 03/12/2015 | | | | | | | | |
| Approval Status: | Approved | Created By: | | | | | | | | | |
| Post Status: | Posted | Modified: | 03/12/2015 | | | | | | | | |
| Modified By: | | | | | | | | | | | |
| Setoff Status: | No Credit memo created | | | | | | | | | | |
| ERS Type: | Not Applicable | | | | | | | | | | |
| Close Status: | Open | | | | | | | | | | |
| Budget Status: | Valid | | | | | | | | | | |
| Budget Misc Status: | Valid | | | | | | | | | | |

Below the form, there is a section for "View Related" with a dropdown menu set to "Payment Inquiry" and a "Go" button. At the bottom, there are buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Refresh", "Add", and "Update/Display".

Voucher Summary tab in Version 9.2:

The screenshot shows the Oracle Version 9.2 Voucher Summary tab. It features a top navigation bar with "Favorites", "Main Menu", "Accounts Payable", "Vouchers", "Add/Update", and "Regular Entry". Below this is a search bar with "All" and "Search" options, and buttons for "Advanced Search" and "Last Search Results". The main content area displays a form with the following fields:

| Summary | | Related Documents | | Invoice Information | | Payments | | Voucher Attributes | | Error Summary | |
|---------------------------|--|-----------------------|-------------------|---------------------|--|----------|--|--------------------|--|---------------|--|
| Business Unit | US001 | Invoice Date | 09/05/2012 | | | | | | | | |
| Voucher ID | V090501 | Invoice No | V090501 | | | | | | | | |
| Voucher Style | Regular | Invoice Total | 1,000.00 | USD | | | | | | | |
| Supplier Name | Bay Area Electric- 998 Powel St. P.O. Box 1212 attn: JTL San Francisco, CA 94001 | Pay Terms | Net 30 | | | | | | | | |
| | | Voucher Source | Quick Invoice | | | | | | | | |
| Entry Status | Recycle | Origin | ONL | | | | | | | | |
| Match Status | No Match | Created On | 12/15/2014 5:23PM | | | | | | | | |
| Approval Status | Approved | Created By | SAMPLE | | | | | | | | |
| Post Status | Unposted | Last Update | 12/15/2014 5:23PM | | | | | | | | |
| | | Modified By | VP1 | | | | | | | | |
| Doc Tol Status | Valid | ERS Type | Not Applicable | | | | | | | | |
| Budget Status | Valid | Close Status | Open | | | | | | | | |
| Budget Misc Status | Valid | | | | | | | | | | |

Below the form, there is a section for "View Related" with a dropdown menu set to "Payment Inquiry" and a "Go" button. At the bottom, there are buttons for "Return to Search", "Previous in List", "Next in List", "Notify", "Refresh", "Add", and "Update/Display".

- Oracle Secure Enterprise Search (SES)
 - Provides global search capabilities that enables the user to take action from search results without navigating through the menus
 - There are two search abilities available:
 - Basic
 - Advanced
 - Basic allows the user to search for a keyword or string
 - Advanced allows the user to enter other filter and criteria to narrow the result
 - Results will only display items the user has access to

Basic search for "voucher"

Oracle
Menu voucher Advanced Search Last Search Results

Search Results for "voucher"

Filter by

Menu Folder

- Accounts Payable (96)
- Set Up Financials (11)
- Suppliers (5)
- Asset Management (4)
- Procurement Contracts (4)
- More...

141 results matched your search criteria

[Voucher Origins](#)
Last Updated Date: 2012-05-31 09:58:47
Define **voucher** entry points and **voucher** defaults.
Application: Financials/Supply Chain

[Voucher Register](#)
Last Updated Date: 2012-05-31 09:58:47
List **vouchers** by business unit, date entered, and **voucher** ID.
Application: Financials/Supply Chain

[Close Voucher](#)
Last Updated Date: 2012-05-31 09:58:47
Mark **vouchers** to be closed during **voucher** post.
Application: Financials/Supply Chain

[Voucher Maintenance Search](#)
Last Updated Date: 2012-05-31 09:58:47
Search for **vouchers** to update in the **Voucher** Maintenance component.
Application: Financials/Supply Chain

[Voucher Maintenance](#)
Last Updated Date: 2012-05-31 09:58:47
Correct data for large **vouchers** or **vouchers** that have recycle status.
Application: Financials/Supply Chain

[Voucher Build Error Detail](#)
Last Updated Date: 2012-05-31 09:58:47

Basic search for "New York"

Search Results for "New York"

58 results matched your search criteria

1 2 3 4 5

| Filter by | Results |
|---|--|
| Business Unit US001 (58) | Expense - Schumacher,Kenneth 0000000049 / 1 Air Travel - United Last Updated Date: 2012-04-10 09:36:33 Date: 2000-08-01 Expense Report Status: Paid Amount: 350 USD Entered By: VP1 |
| Creation Date 2015 (8) 2014 (3) 2008 (23) 2003 (17) 2000 (7) | Expense - Schumacher,Kenneth 0000000051 / 1 Conference/Meeting - Various Last Updated Date: 2012-04-10 09:36:33 Date: 2000-08-13 Expense Report Status: Staged Amount: 1523.77 USD Entered By: VP1 |
| Name Schumacher,Kenneth (30) Elliot,Ken (12) Lee,Susan (8) Emmerson,Nancy (5) Ann,Mary (1) More... | Expense - Schumacher,Kenneth 0000000050 / 1 Automobile Rental - Hertz Rent-a-Car Last Updated Date: 2012-04-10 09:36:33 Date: 2000-08-09 Expense Report Status: Pending Amount: 60 USD Entered By: VP1 |
| Report Status Pending (30) Staged (7) Submitted for Approval (7) On Hold, with Auditor (5) Submission in Process (4) More... | Expense - Schumacher,Kenneth 0000000052 / 1 Automobile Rental - Hertz Rent-a-Car Last Updated Date: 2012-04-10 09:36:33 Date: 2000-08-08 Expense Report Status: Staged Amount: 72 USD Entered By: VP1 |
| Expense Business Purpose Demonstrations (16) Off-site Meeting (14) General Travel and Expen...(12) Consulting Services (10) Customer Visit (3) More... | Expense - Emmerson,Nancy 0000000056 / 1 Breakfast - Last Updated Date: 2012-04-10 09:36:33 Date: 2003-07-01 Expense Report Status: Staged Amount: 10 USD Entered By: SAMPLE |
| Expense Type Conference (16) Air Travel (9) Automobile Rental (7) Breakfast (6) Dinner (5) More... | Expense - Schumacher,Kenneth 0000000055 / 1 Conference/Meeting - Various Last Updated Date: 2012-04-10 09:36:33 Date: 2000-08-22 Expense Report Status: Staged Amount: 2000 USD Entered By: VP1 |
| Expense Location No Value (31) New York, New York (18) Alexandria, VA (3) NEW YORK - MANHATTAN, New.(3) LAS VEGAS, Nevada (1) More... | Expense - Emmerson,Nancy 0000000056 / 2 Dinner - Last Updated Date: 2012-04-10 09:36:33 Date: 2003-07-01 Expense Report Status: Staged Amount: 30 USD Entered By: SAMPLE |
| | Expense - Emmerson,Nancy 0000000056 / 3 Entertainment - Other - Last Updated Date: 2012-04-10 09:36:33 Date: 2003-07-01 Expense Report Status: Staged Amount: 50 USD Entered By: SAMPLE |
| | Expense - Schumacher,Kenneth 0000000063 / 1 Conference/Meeting - Various |

Advanced search within Expenses for “New York”

Favorites ▾ Main Menu ▾ > "New York"

ORACLE Welcome SOK Manager XYZ Expenses ▾ New York >> Advanced Search

▼ Search Criteria

*Search in Expenses ▾

Keywords New York Search Tips

With this Exact Phrase

With any of these Words

Exclude

Report ID contains phrase ▾

Report Description contains phrase ▾

Name contains phrase ▾

Empl ID contains phrase ▾

Report Status contains phrase ▾

Creation Date = ▾ B1

Expense Type contains phrase ▾

Approver ID contains phrase ▾

Approver Name contains phrase ▾

Expense Comments contains phrase ▾

GL Business Unit contains phrase ▾

GL Business Unit Description contains phrase ▾

Expense Business Purpose contains phrase ▾

Expense Location contains phrase ▾

Exception Triggered contains phrase ▾

Expense Amount = ▾

Expenses Post Status contains phrase ▾

Preferred Merchant contains phrase ▾

Non-Preferred Merchant contains phrase ▾

Entered By contains phrase ▾

Risk Level contains phrase ▾

Expense Submission Date > ▾ 01/01/2014 B1

Expense Transaction Date = ▾ B1

Receipt Verified contains phrase ▾

Search Clear

Result of advanced search within Expenses for “New York”

Favorites ▾ Main Menu ▾ > "New York"

ORACLE Welcome SOK Manager XYZ Expenses ▾ New York >> Advanced Search Last Search

Search Criteria

Search Results

Filter by 3 results matched your search criteria

| | |
|--|--|
| Business Unit US001 (3) | Expense - Schumacher,Kenneth 0000000090 / 1 Conference/Meeting - Various Last Updated Date: 2015-01-05 11:06:30 Date: 2003-09-01 Expense Report Status: Submitted for Approval Amount: 1523.77 USD Entered By: VP1 |
| Creation Date 2015 (3) | |
| Name Schumacher,Kenneth (3) | Expense - Schumacher,Kenneth 0000000089 / 1 Conference/Meeting - Various Last Updated Date: 2015-01-04 18:41:40 Date: 2003-09-01 Expense Report Status: Submitted for Approval Amount: 1523.77 USD Entered By: VP1 |
| Report Status Submitted for Approval (3) | |
| Expense Business Purpose Off-site Meeting (3) | Expense - Schumacher,Kenneth 0000000091 / 1 Conference/Meeting - Various Last Updated Date: 2015-01-05 11:35:59 Date: 2003-09-01 Expense Report Status: Submitted for Approval Amount: 1523.77 USD Entered By: VP1 |
| Expense Type Conference (3) | |
| Expense Location No Value (3) | |

- Tab Over Functionality
 - Will be turned on in version 9.2
 - This allows users to tab to the next entry field rather than stopping on magnifying glass

Favorites ▾ Main Menu ▾ > General Ledger ▾ > Journals ▾ > Journal Entry ▾ > Create/Update Journal Entries

ORACLE Welcome SOK Manager XYZ Journals Search >> Advanced Search Last Search Results

Header Lines Totals Errors Approval

Unit EGV01 Journal ID NEXT Date 03/24/2015
Template List Change Values

Inter/IntraUnit *Process Edit Journal Process

▼ Lines Personalize Find | [Print] [Refresh]

| Select | Line | *Unit | *Ledger | SpeedType | Entry Event | Account | Oper Unit | Fund | Dept | Program |
|--------------------------|------|-------|---------|-----------|-------------|---------|-----------|------|------|---------|
| <input type="checkbox"/> | 1 | EGV01 | LOCAL | | | | | | | |

Lines to add 1 + - [Calculator]

▼ Totals Personalize Find View All | [Print] [Refresh] First 1 of 1 Last

| Unit | Total Lines | Total Debits | Total Credits | Journal Status | Budget Status |
|-------|-------------|--------------|---------------|----------------|---------------|
| EGV01 | 1 | 0.000 | 0.000 | N | N |

Save Notify Refresh Add Update/Display

Header | Lines | Totals | Errors | Approval

- Attachment ability will be turned on in the entire application
 - This will allow users to attach documentation related to their transactions
 - SMART 9.0 currently has attachment functionality for requisitions, purchase orders, and contracts
 - Version 9.2 will allow users to add multiple attachments to the header line in eProcurement
 - Version 9.2 will add attachment functionality for vouchers, deposits, expenses, assets, journals, and vendors

- Attachment recommendations
 - There will be a limit to the size of the file being attached
 - Size limits will be included in future project communication
 - Multiple attachments are allowed
 - Avoid attaching documents that do not add value to the transaction

Adding an attachment in Expenses

[Favorites](#) | [Main Menu](#) | [Travel and Expenses](#) | [Expense Report](#) | [Create/Modify](#)

ORACLE Welcome SOK Manager XYZ

[Expenses](#) | [Advanced Search](#) | [Last Search Results](#)

[Home](#) | [Worklist](#)

Create Expense Report

[Save for Later](#) | [Summary and Submit](#)

Carlos Masterson | [Actions](#) | [...Choose an Action](#) | [GO](#)

***Business Purpose** [General Travel and Expense](#) | **Default Location** [KANSAS CITY, Missouri](#) | [Attachments](#)

***Report Description** [Carlo's Expenses](#) | **Reference** [Reference](#)

Expenses | [Expand All](#) | [Collapse All](#) | [Add](#) | [My Wallet \(0\)](#) | [Quick-Fill](#)

Totals (1 Line) | **0.00** | **USD**

| *Date | *Expense Type | *Description | *Payment Type | *Amount | *Currency |
|------------|---------------|---------------|---------------|---------|-----------|
| 03/24/2015 | Lunch | Carlo's Lunch | Cash | 14.44 | USD |

241 characters remaining | [Receipt Split](#) | [Attendees](#)

***Billing Type** [Internal](#) | ***Location** [KANSAS CITY, Missouri](#) | [Accounting Details](#)

☒ **Default Rate** | ***Exchange Rate** [1.00000000](#) | **Reimbursement Amt** **0.00** | **USD**

☐ **Non-Reimbursable** | ☐ **No Receipt**

[Expand All](#) | [Collapse All](#)

Totals (1 Line) | **0.00** | **USD**

Adding an attachment in Expenses

Expense Report Attachments Help

Report ID NEXT

| Details | | | | | Personalize Find View All First 1 of 1 Last |
|-----------|-------------|------|------|-----------------|---|
| File Name | Description | User | Name | Date/Time Stamp | |
| View | | | | | |

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

OK Cancel

File Attachment Help

Browse... No file selected.

Upload Cancel

Adding an attachment in Expenses

Create Expense Report

Carlos Masterson ?

Actions ...Choose an Action GO

*Business Purpose General Travel and Expense Default Location KANSAS CITY, Missouri Attachments (1)

*Report Description Carlo's Expenses Reference

Expenses ?

Expand All | Collapse All Add: | My Wallet (0) | Quick-Fill

Totals (1 Line) 14.44 USD

| *Date | *Expense Type | *Description | *Payment Type | *Amount | *Currency |
|------------|---------------|---------------|---------------|---------|-----------|
| 03/24/2015 | Lunch | Carlo's Lunch | Cash | 14.44 | USD |

*Billing Type Internal

*Location KANSAS CITY, Missouri

Accounting Details ?

241 characters remaining

Receipt Split

Attendees

☒ Default Rate

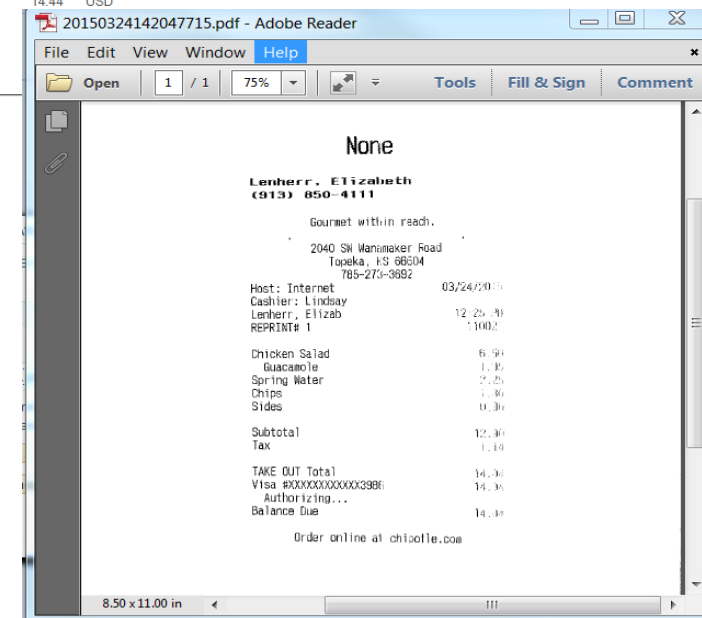
☐ Non-Reimbursable

☐ No Receipt

*Exchange Rate 1.00000000

Reimbursement Amt 14.44 USD

Totals (1 Line)



- Example of where the Journal Header page allows attachments

Oracle® Welcome SOK Manager XYZ

Journal ID NEXT Date 03/24/2015

Unit EGV01

Long Description

254 characters remaining

*Ledger Group RECORDING

Ledger

*Source CFO

Reference Number

Journal Class

Transaction Code GENERAL

Agency Location Code

SJE Type

Adjusting Entry Non-Adjusting Entry

Fiscal Year 2015

Period 3

ADB Date 03/24/2015

☐ Auto Generate Lines

☐ Save Journal Incomplete Status

☐ Autobalance on 0 Amount Line

Currency Defaults: USD / CRRNT / 1

Attachments (0)

Reversal: Do Not Generate Reversal

Commitment Control

Entered By VP1 Kenneth Schumacher

Entered On

Last Updated On

Save Notify Refresh

Add Update/Display

Header | Lines | Totals | Errors | Approval

WorkCenters

- WorkCenters functionality
 - Separate WorkCenter available for each module
 - Starting point for key menu links and queries
 - Limit the need to navigate through the full menu
 - Show key information readily
- Flexibility in Configuration and Use
 - Initially configured by the project team and supported by OSM
 - Limited personalization allowed by user

Work Centers

General Ledger WorkCenter

ORACLE

All Search Advanced Search Last Search Results

Main Reports/Queries

My Work

Edit Filters

Current Work

- Journals Ready for Processing (21)
- Journals Pending My Approval
- ChartField Requests Pending My Approval
- Reconciliations Pending My Approval

Exceptions

Links

Manage and Monitor Journals

- Budgets Overview
- Enter Budget Journals
- Create/Update Journal Entries
- Conv. Journals

Journals Ready for Processing

Journals

General Details 1 Details 2

| | Unit | Journal ID | Journal Date | UnPost Sequence | Line Unit | InterUnit |
|--------------------------|-------|------------|--------------|-----------------|-----------|--------------------------|
| <input type="checkbox"/> | EGV01 | 0000000264 | 12/22/2014 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000265 | 12/22/2014 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000266 | 12/29/2014 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000268 | 01/06/2015 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000269 | 01/07/2015 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000270 | 01/08/2015 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000271 | 01/07/2015 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000272 | 01/08/2015 | | EGV01 | <input type="checkbox"/> |
| <input type="checkbox"/> | EGV01 | 0000000273 | 01/08/2015 | | EGV01 | <input type="checkbox"/> |

Work Centers – Reports / Queries tab

General Ledger Workl ⚙️ «

Main **Reports/Queries**

Queries ⚙️ ▼

- Query Manager
- Pivot Grids
 - Kansas Ledger
- Common Queries
 - Journals not posted
 - Journal Totals
 - My Queries**
 - KK Activity Log
 - KK Activity with Rel PO**
 - Input to 1099C Crystal

Download results in : Excel SpreadSheet CSV Text File XML File (7 kb)

View All

| | Tran ID | Tran Date | Tran Line | Referenced Budg | Ledger Grp | Ledger | Account | Dept |
|----|------------|------------|-----------|-----------------|------------|------------|---------|------|
| 1 | 0000000431 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 2 | 0000000431 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 3 | 0000000432 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 4 | 0000000432 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 5 | 0000000433 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 6 | 0000000433 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 7 | 0000000434 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 8 | 0000000434 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 9 | 0000000435 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 10 | 0000000435 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 11 | 0000000446 | 02/26/2002 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 12 | 0000000446 | 02/26/2002 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 13 | 0000000446 | 02/26/2002 | 3 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 14 | 0000000446 | 02/26/2002 | 4 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 15 | 0000000446 | 02/26/2002 | 5 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 16 | 0000000446 | 02/26/2002 | 6 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 17 | 0000001226 | 12/29/2014 | 1 | Y | EG_DEPT | EG_DEP_ENC | 6958 | |
| 18 | 0000001226 | 12/29/2014 | 1 | N | EG_DEPT | EG_DEP_EXP | 6956 | |
| 19 | 0000001226 | 12/29/2014 | 2 | Y | EG_DEPT | EG_DEP_ENC | 6958 | |
| 20 | 0000001226 | 12/29/2014 | 2 | N | EG_DEPT | EG_DEP_EXP | 6956 | |

Reports/Processes ⚙️ ▼

- Common Processes
 - Create Account Reconciliation
 - Request Allocation

Work Centers – Reports / Queries tab

Define User Query Links

Queries Pagelet Personalization

Configuration ID GL

General Ledger WorkCenter

User ID JSMITH

Query Groups ?

Find | View All First 3

*Group Label My Queries

Display Order 2

☐ Start Group Collapsed

Query Definition ?

Personalize | Find | First 1-3 of 3

| Display Order | Owner | *Type | Override Title/Description | Query Name | Description | Show Link | Starting Page |
|---------------|--------------|-------|-------------------------------------|-------------------------|------------------------|-------------------------------------|--------------------------|
| 2 | Public Owner | Query | <input type="checkbox"/> | KK_ACTIVITY_WITH_REL_PO | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3 | Public Owner | Query | <input type="checkbox"/> | 1099C_CUST_DATA | Input to 1099C Crystal | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 1 | Public Owner | Query | <input checked="" type="checkbox"/> | GLC8570_KK_ACT_LOG | KK Activity Log | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Save

Work Centers – Links tab

Oracle
All Search Advanced Search







General Ledger WorkCenter
Main Reports/Queries
My Work Edit Filters

Configuration ID GL
User ID JSMITH
General Ledger WorkCenter

My Work Groups Find | View All First 1 of 2 Last

Group Label Current Work

My Work Links Personalize | Find | First 1-6 of 6 Last

| Link Label | Filter ID | Description | Edit Filter |
|---|------------|------------------------------|---|
| Journals Ready for Processing | GLJRNL1 | Journal Generic Filter |  |
| Journals Approaching Period End** | GLJRNLPEND | Journals Close to Period End |  |
| Journals Not Posted in Closed Period | GLJRNLCP | Journals in Closed Period |  |
| Journals Pending My Approval | GLJRNLAPPR | GL Journal Approval |  |
| ChartField Requests Pending My Approval | GLFLDRAPPR | Field Request Approval |  |
| Reconciliations Pending My Approval | GLRCWB | Recon Work Bench |  |

eSupplier

Registration Process

Step 1

Favorites ▾

Main Menu ▾ > Suppliers ▾ > Supplier Registration ▾ > Register Suppliers

ORACLE[®]

Welcome SOK Manager XYZ

All ▾ Search >> Advanced Search

Welcome

Identifying Information

Addresses

Contacts

Categorization

Submit

Exit

 |

◀ Previous

Next ▶

Welcome - Step 1 of 6

To complete your registration, please fill in the information for each step of the registration process. Use the navigation buttons "Next" and "Previous" to move between steps or "Save for Later" to save your work to be resumed later. Once you have provided all the required information, proceed to the "Submit" step where you may submit your registration for consideration. You will receive an email confirmation shortly after submittal.

If you have any questions or feedback on the registration process, please call the application processing service center at:
(800) 555-1212
or email:
registration@registration.com

Select an activity below: ?

☒ Start a new registration form

What type of entity do you represent?

☒ Business

☐ Individual

☐ Continue from where you left

Exit

 |

◀ Previous

Next ▶

* Required field



Registration Process

Step 2

Favorites ▾

Main Menu ▾ > Suppliers ▾ > Supplier Registration ▾ > Register Suppliers

ORACLE

Welcome SOK Manager XYZ

All ▾ Search

Advanced Search

Welcome

Identifying Information

Addresses

Contacts

Categorization

Submit

Exit

Save for Later

Previous

Next

Identifying Information - Step 2 of 6

Unique ID & Company Profile ?

* Tax Identification Number

* Entity Name

http://URL

* Supplier Short Name

Open For Ordering

Supplier Relationships ?

Corporate Supplier

Corporate SetID

Corporate Supplier ID

Profile Questions ?

When was your company established?

What is your company's annual revenue?

Add Attachment

How many employees does your company have?

Are your products manufactured locally?

Please attach your TIN or SS ID scanned copy

Attachment

Standard Industry Codes ?

US SIC Codes

Description

Add SIC Code

Additional Address ?

HUBZone Program

Size of Small Business

Veteran-Owned Small Business

Sm Disadvantaged Business Prog

Other Preference Programs

Please check all that apply:

Emerging Small Business

Women-Owned Business

Veteran

Disabled

Comments ?

Exit

Save for Later

Previous

Next

* Required field

Registration Process

Step 3

Favorites ▾ Main Menu ▾ > Suppliers ▾ > Supplier Registration ▾ > Register Suppliers

ORACLE Welcome SOK Manager XYZ All ▾ Search >> Advanced Search

Welcome Identifying Information **Addresses** Contacts Categorization Submit

Exit Save for Later < Previous Next >

Addresses - Step 3 of 6

Primary Address ?

* Country USA United States

Address 1

Address 2

Address 3

City

County Postal

State

Email ID

Other Addresses ?

Check boxes below to indicate addresses that are different from your Primay Address above:

☐ **Remit To Address**
Address for remitting payment

☐ **Invoice Address**
Address from which you send invoice

Exit Save for Later < Previous Next >

Registration Process

Step 4

Oracle® Welcome SOK Manager XYZ

Home | Worklist | MultiChannel Console | Add to Favorites

Suppliers > Supplier Registration > Register Suppliers

All Search > Advanced Search

Welcome Identifying Information Addresses **Contacts** Categorization Submit

Exit Save for Later

Contacts - Step 4 of 6

Company Contacts ?

You have not added any contact information to your application. Click "Add Contact" button to add new contact information.

Add Contact

* Required field

Exit Save for Later

Add Contacts

Help

Contact Information ?

* First Name ☐ Primary Contact

* Last Name

Title

* Email ID

* Telephone Ext

Fax Number

Contact Type

User Profile Information ?

* Requested User ID

Description

Language Code

Time Zone

Currency Code

OK Cancel

Registration Process

Step 4

Favorites ▾

Main Menu ▾ > Suppliers ▾ > Supplier Registration ▾ > Register Suppliers

ORACLE[®]

Welcome SOK Manager XYZ

All ▾ Search >> Advanced Search

Welcome

Identifying Information

Addresses

Contacts

Categorization

Submit

Exit


Save for Later

Previous

Next

Contacts - Step 4 of 6

Company Contacts ?

| Primary | Name | Phone | Designate Address |
|----------------------------------|----------|--------------|---|
| <input checked="" type="radio"/> | Jane Doe | 999/123-4567 | Primary Address ▾  |

Add Contact

Exit

Save for Later

Previous

Next

* Required field

Registration Process

Step 5

Favorites ▾

Main Menu ▾ > Suppliers ▾ > Supplier Registration ▾ > Register Suppliers

ORACLE®

Welcome SOK Manager XYZ

All ▾ Search >> Advanced Search

Welcome

Identifying Information

Addresses

Contacts

Categorization

Submit

Exit

Save for Later

◀ Previous

Next ▶

Submit - Step 6 of 6

Click the "Review" button to review the registration information.

Click the "Submit" button to submit your registration after reviewing and accepting following Terms of Agreement .

Email communication regarding this registration will be sent to:

Terms and Conditions ?

Make sure you read terms of agreement fully before submitting your registration.

☐ Click to accept the Terms of Agreement below.

[Terms of Agreement](#)

Review

Submit

Exit

Save for Later

◀ Previous

Next ▶



Welcome SOK Manager XYZ

Registration Submit Details

Submitted



You have successfully submitted your registration.

Your registration ID:

0000000018

Any email regarding the registration status will be sent to:

deg_olathe@hotmail.com

[Register New Supplier](#)

Your registration form has been submitted for approval



sokfsdem@sierra-cedar.com (sokfsdem@sierra-cedar.com) [Add to contacts](#) 10:54 AM ▶

Actions ▾

To: deg_olathe@hotmail.com ▾

Your supplier registration form, registraion ID 0000000018 has been submitted for approval.

You will be notified at this email address of any changes in your registration status.

If you have any question or feedback regarding your registraion ID 0000000018, please call the application service center at (800) 793-9770, or email john.doe@obapplication.com.

Thank you.
ABC Company.

Review Purchase Orders (Cont.)

Favorites ▾

Main Menu ▾ > Manage Orders ▾ > Purchase Orders

ORACLE®

Purchase Orders

Purchase Order Details

ERNIE'S BIKE SHOP

PO Number 0000000001

PO Status Dispatched

Buyer Kenneth Schumacher

Billing Location US001

Payment Terms Net 30

Purchase Order Date 07/10/2000

Last Dispatch 05/08/01 3:17:20PM

Purchase Order Total

| | |
|--------------------|---------------|
| Merchandise Amount | 20,653.80 |
| Freight/Tax/Misc. | 0.00 |
| Total Amount | 20,653.80 USD |

▶ Standard BU Comments

Purchase Order Lines

Personalize | Find | View All | First 1 of 1 Last

| Line Information | Extension | Line Details | Contract Info | | |
|------------------|-----------|--------------|-------------------------|-------------|-----------------|
| Line | Status | Item ID | Description | Quantity | Merchandise Amt |
| 1 | Active | BR4400 | Yoke, Brake Subassembly | 870.0000 EA | 20,653.80 USD |

Invoice List

Personalize | Find | View All | First 1 of 1 Last

| Invoice | Invoice Date | Amount | Due Date | Appr Stat | Voucher |
|---------------|--------------|-------------------|------------|-----------|---------|
| LARGE VOUCHER | 01/10/2003 | 52,616,618.00 USD | 02/09/2003 | Approved | LRGVCHR |

[Return to Purchase Order List](#)

Review Receipts (Cont.)

Favorites ▾ Main Menu ▾ > Manage Orders ▾ > View Receipts

ORACLE®

Review Receipts

Receipt Details

ERNIE'S BIKE SHOP

| | | | |
|----------------------|-------------------|---------------------|--|
| Receipt Number | 0000000031 | Packing Slip Number | |
| Receipt Datetime | 05/27/2005 1:27PM | Pro Number | |
| Receipt Status | Fully Received | | |
| Item ID | 10015 | | |
| Supplier Item ID | | | |
| Quantity Received | 100.0000 | Each | |
| Quantity Inspected | 0.0000 | Each | |
| Quantity Accepted | 100.0000 | Each | |
| Quantity Returned | 0.0000 | Each | |
| Quantity Rejected | 0.0000 | Each | |
| Net Receipt Quantity | 100.0000 | Each | |
| Reason for Rejection | | | |
| RMA Number | | RMA Line | |

Purchase Order Schedule Personalize | Find | | First 1 of 1 Last

| PO Number | Due Date | Quantity | Ship To | Ship Via | Freight Trm | Price | Merchandise Amt | |
|------------|------------|----------|----------------|----------------|-------------|----------|-----------------|-----|
| 0000000093 | 04/14/2005 | 100.0000 | USA - New York | Common Carrier | Destination | 25.50000 | \$2,550.00 | USD |

Invoice Lines Personalize | Find | | First 1 of 1 Last

| Invoice | Description | Statistic Amount | | Unit Price | Merchandise Amt | |
|---------|-------------|------------------|--|------------|-----------------|--|
| | | | | | | |

No Invoices Found

[Return to Receipt List](#)

Review Invoices (Cont.)

Favorites ▾ Main Menu ▾ > Review Payment Information ▾ > Invoices

ORACLE

Review Invoices

Invoice Details

ERNIE'S BIKE SHOP

Invoice Number 12525

Invoice Date 04/10/2006

Due Date 05/10/2006

Discount End Date

Approval Status Pending Approval

Payment Status To be Paid

Terms Net 30

| Invoice Total | | | |
|---------------|---------|-----|--|
| Gross Amount | \$27.50 | USD | |
| Discount | \$0.00 | USD | |
| Net Amount | \$27.50 | USD | |

| Invoice Line Details | | | | | | | Personalize Find View All [Print] [Grid] | First 1 of 1 Last |
|----------------------|-------------|------------------|-----|------------|-----------------|--|--|-------------------|
| Item ID | Description | Statistic Amount | UOM | Unit Price | Merchandise Amt | | | |
| 10014 | Cadence Kit | | EA | 5.50000 | \$27.50 USD | | | |

| Payment Schedule | | | | | | | | | Personalize Find View All [Print] [Grid] | First 1 of 1 Last |
|------------------|----------------|-------------|------------|--------|------------|---------|------------|--|--|-------------------|
| Scheduled to Pay | Payment Number | Gross Amt | Discount | Method | Status | On Hold | Withd Hold | | | |
| 05/10/2006 | | \$27.50 USD | \$0.00 USD | Check | Unselected | No | No | | | |


| Payments Made | | | | Personalize Find View All [Print] [Grid] | First 1 of 1 Last |
|---------------|------|---------|--|--|-------------------|
| Reference | Date | Amount | | | |
| | | \$0.000 | | | |

No Payments Made

Invoices

(Cont.)

| ▼ Purchase Orders | | | Personalize Find View All   | First  1 of 1  Last |
|-------------------|------------|------------|---|---|
| Purchase Order | PO Date | Status | | |
| 0000000171 | 04/07/2006 | Dispatched | | |

| ▼ Receipts | | | | Personalize Find View All   | First  1 of 1  Last |
|---------------|----------------|----------------|--------------|---|---|
| Received Date | Receipt Number | Bill of Lading | Packing Slip | | |
| | | | | | |

No Receipts Found

[Return to Invoice List](#)

Payments (Cont.)

Favorites ▾

Main Menu ▾

> Review Payment Information ▾

> Payments

ORACLE®

Review Payments

Payment Details

Bay Area Electric-
000001

Invoice Number TR5

Payment Date 05/16/2005

Method Check

Pay Status Paid

Amount \$10,000.50

Currency USD

Paid To Bay Area Electric-
BAElectric

Country USA United States

Address 1 998 Powel St.

Address 2 P.O.Box 1212

Address 3 attn: JTL

City San Francisco



County Alameda

Postal 94001

State CA California

From Demo Bank- Chicago

Payment Advice

Personalize | Find |   First 1 of 1 Last

| Invoice | | Gross Amount | | Discount | | Discount Taken | | Paid Amount | |
|---------|--|--------------|-----|----------|-----|----------------|-----|-------------|-----|
| TR5 | | 10,000.50 | USD | 0.00 | USD | 0.00 | USD | 10,000.50 | USD |

[Return to Payments Made](#)

Mobile Applications

- Mobile Apps provides real-time access to business information via desktop, smartphones or tablet devices.
- Current delivered mobile apps:
 - Mobile Approvals
 - Mobile Expenses
 - Mobile eProcurement

- Does not require downloads or additional software or middleware
- Access is through the user's web browser
- Users log in using their current SMART security to an intuitive, touch optimized, user experience geared toward their smartphone or tablet
- Oracle has tested on the following mobile devices:
 - Android Phone, Apple iPhone, Apple iPad, Google Nexus Tablet, and Samsung Galaxy Tablet

Mobile Applications

The screenshot displays the Oracle Focus web application interface. The 'Main Menu' is open, showing a 'Search Menu' with a list of folders and documents. The 'Mobile Applications' document is highlighted with a red arrow. The interface includes a 'Favorites' section, a 'PO Spend Analysis' chart, and a 'My Reports' section.

Main Menu Search Menu:

- Data Expansion Tools
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Customers
- Partners
- Products
- Catalog Management
- Customer Contracts
- Order Management
- Pricing Configuration
- Customer Returns
- Items
- Cost Accounting
- Suppliers
- Procurement Contracts
- Purchasing
- Inventory
- eProcurement
- Services Procurement
- Sourcing
- Engineering

Mobile Applications Sub-menu:

- Service Request
- Procurement
- Assets
- Travel and Expenses
- Mobile Applications
- Open Resource Requests
- Employee Project Center
- Staffing Apply Online
- Travel and Expense Center
- Payment Request Center

PO Spend Analysis Chart:

| Category | Amount |
|----------|--------|
| Business | ~1,800 |
| Category | ~2,200 |
| Shipping | ~1,500 |

My Reports:

- Report
- PTSF_GEN
- PORTAL_C
- AP_EMAIL_
- GLRN_CRE
- GLRN_CRE

Top Suppliers:

- Top Sup
- Supplier N
- Contractor
- ERNIE'S E
- TRAILBLA

Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Mobile Applications

ORACLE Welcome SOK Manager XYZ All ▾ Search

Mobile Applications

Click on an application below. Email the URL from the address bar of the new window to yourself so that you can access it from your tablet or phone. You can then add it to the home screen of your mobile device.



Expenses



Approvals



eProcurement (For tablets)

- Mobile Approvals

- Allows flexibility to approve transactions on the go. You can log in from a mobile device and process transactions that are pending your approval.
 - Journal entries
 - Expense reports
 - Vouchers
 - Purchase orders
 - Requisitions

Mobile Applications



Approvals (2 of 2) Home

Mass Approval Filter

Voucher 2

Bay Area Electric- 159,001.00 USD
 PENDING APPROVAL September 28, 2012

East Bay Office Supplies 1,125.00 USD
 TEST00002 January 19, 2015

Summary

Bay Area Electric-
159,001.00 USD

Scheduled Due Date **January 31, 2013**
 Invoice ID **PENDING APPROVAL**
 Creator **Theresa Monroe**
 Invoice Date **September 28, 2012**
 Pending Since **January 18, 2015**

Voucher ID **US001 / 00000211**
 Voucher Source **Online**
 Voucher Style **Regular Voucher**

Lines

Line # 1
159,001.00 USD

Inventory Item ID
UOM

Quantity 0
Unit Price 0.00 USD

Pending Actions

Stage 1: Amount Approval

BUSINESS_UNIT=US001, VOUCHER_ID=00000211: Pending

Voucher Amount Approval Path

Pending
Sean Tuppera - SCI
 AP1

→

Not Routed
VP1 Clone - for test purposes
 AP2

→

Not Routed
Clint Burnett
 AP3

✓ Approve
✗ Deny

- Mobile Expenses

- Allows mobile entry of expense reports, approval actions and review of past expenses.
- Use your mobile device to access the app and manage your expense reporting on the go.
 - Create and manage expense reports
 - Review past expense reports and their statuses for the past 6 months
 - Access your pending expense reports
 - Access your submitted expense reports that are awaiting approval or payment
 - Display all expense reports that require your review and approval

Mobile Applications



Expense Header

Description

Conference in Las Vegas

Business Purpose

User Conference

Comment

Default Accounting

GL Business Unit

US001

Department

17300

Fund Code

0001

PC Business Unit

US001

Project

FOCUS

Activity

Source Type

OTHER

Category

Subcategory

- Mobile eProcurement
 - Provides the ability to add and manage requisitions from a mobile device.
 - Use your mobile device to access the app and manage your requisitions on the go.
 - Create and manage requisitions

Mobile Applications

ORACLE

Menu 0

My Orders
50 of 113

| | |
|--|-----------------------------------|
| new test EGV01/00000000013 Approved | 5.00 USD March 2, 2015 |
| 0000000012 EGV01/00000000012 PO(s) Created | 5.00 USD January 27, 2015 |
| 0000000150 US001/00000000150 Approved | 12000.00 USD January 19, 2015 |
| Test1 EGV01/00000000001 Received | 240.00 USD December 17, 2014 |
| 0000000107 US001/00000000107 Approved | 4024.50 USD November 30, 2012 |
| PI-RQ052 EGV05/PI-RQ052 Approved | 7624402.15 USD January 6, 2010 |
| PC00000002 EGV05/PC000000002 Approved | 29.00 USD March 24, 2009 |
| PI-RQ031 EGV05/PI-RQ031 PO(s) Dispatched | 186000.00 USD January 2, 2009 |
| PC00000003 EGV05/PC000000003 Approved | 500.00 USD April 18, 2008 |
| PI-RQ032 EGV05/PI-RQ032 Partially Dispatched | 16980.00 USD February 10, 2008 |
| PI-RQ030 | 16980.00 USD |

Summary

new test 5.00 USD

Requester **Kenneth Schumacher**
Entered By **Kenneth Schumacher**
Requisition Date **March 2, 2015**

Requisition ID **0000000013**
Business Unit **EGV01**
Request State **Approved**

Requisition
Approvals
Inventory
Purchase Orders
Change Request
Receiving
Returns
Invoice
Payment

Lines

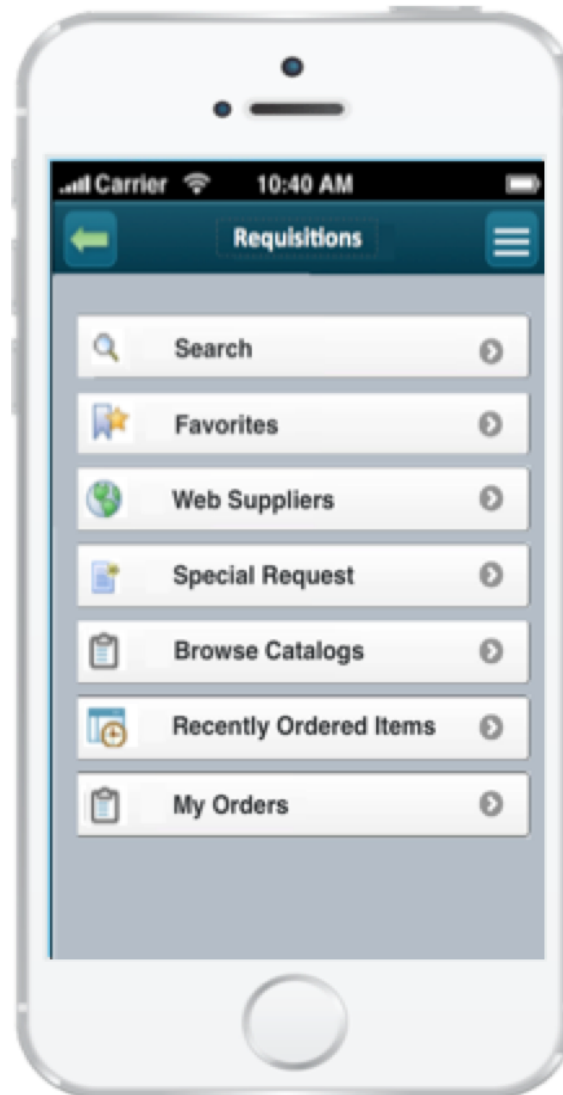
| | | | |
|--|--------------------------------------|--|----------|
| <div>Line #1 - DEG TEST1...</div> <div>Price 1.00</div> | <div>Item ID Ship To EGV01</div> | <div>Quantity 1 EA Line State Approved</div> | 1.00 USD |
| <div>Line #2 - DEG TEST 2...</div> <div>Price 2.00</div> | <div>Item ID Ship To EGV01</div> | <div>Quantity 2 EA Line State Approved</div> | 4.00 USD |

Full Site

Home

Sign out

Mobile Applications



Security & Browser Compatibility

- Map new functionality to existing SMART roles
- Minimal new roles:
 - 1 Bidder self-registration role
 - 3 eSupplier roles

- Current SMART 9.0:

| <u>Browser</u> | <u>Version</u> |
|--------------------|----------------------|
| Internet Explorer | 6, 7 & 8 |
| Mozilla Firefox | 1.5, 2, 3, 3.5 & 3.6 |
| Google Chrome | n/a |
| Safari (Mac users) | 2.0.4, 3, 4 & 5 |

- Upgraded SMART 9.2 desktop:

| <u>Browser</u> | <u>Version</u> |
|--------------------|----------------|
| Internet Explorer | 9, 10 & 11 |
| Mozilla Firefox | 24, 30 |
| Google Chrome | n/a |
| Safari (Mac users) | 6 & 7 |

Browser Compatibility (cont.)

- Upgraded SMART 9.2 mobile device:

| <u>Browser</u> | <u>Version</u> |
|----------------|--------------------------------------|
| iPhone | IOS 7, 8.0 |
| Android | Google Android 4.4, 5.0 (Planned) |

Agency Task Summary

- 3 Agency Tasks have occurred so far:
 1. GL001 – Reporting
 2. GL002 – Public and Private Queries
 3. GL003 – KK/GL Utilization

Tasks were sent via email to Agency Coordinator or CFO

- Agency Survey on Computer Simulation Training
 - 57% utilize existing training
 - 85% found it to be an effective tool
 - 68% want simulations in addition to job aids

Change Management

Change Management Objectives

- Identify agency staff to serve as Agency Coordinators who will contribute to a successful upgrade
- Define and communicate the Agency Coordinator(s) roles/responsibilities
- Inform agencies of the scope, recommendations, implementation activities, timing, and impacts of the Upgrade
- Prepare agencies for the impact the Upgrade will have on them
- Involve agencies in preparation for deployment
- Create a communication strategy that will:
 - Detail activities to involve and build commitment
 - Create an awareness and understanding of the FOCUS Project
 - Provide consistent information
 - Create realistic expectations
 - Build enthusiasm and communicate the benefits
 - Minimize impact to productivity

Agency Coordinators

Your Agency Functions

- Accounts Payable
- Payroll
- General Ledger
- Accounts Receivable
- Purchasing
- Project & Grant Accounting

Project Team

Functional

Technical

Change Management

Agency Coordinator

The Agency person(s) primarily responsible to aid successful transition during the upgrade by:

- Being knowledgeable of FOCUS project activities and responsibilities
- Being aware of the changes the upgrade will have on the agency's operations
- Communicating information from the project team throughout their agency
- Managing activities required during the upgrade

Agency Coordinator(s)

- A task was sent out to each agency asking you to identify your Agency Coordinator(s)
- Any questions about this task and the upgrade should be sent to the following email address:
smartweb@ks.gov
- The SMART Website will include and 'Upgrade' area where materials will be posted.
<http://www.smartweb.ks.gov/>

- Project team members working on System Design Document
- Existing Customizations will be retrofitted and any new customizations that are approved will be applied
- System Test phase will begin in July

Closing Remarks/Questions

